**Phase summary**

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<th>Level</th>
<th>Challenge identification</th>
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<td>Identify the problem that needs to be solved and clearly articulate it</td>
<td>Validate the challenge and establish the level of risk associated with inaction, gain commitment and buy-in internally, and map the system of actors and information flows</td>
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<td>Formally engage with innovators to establish purpose, expectations and scope</td>
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<td>Establish a sustained working relationship with all stakeholders involved, including feedback loops</td>
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**Level**

- Level 1: Identify the problem that needs to be solved
- Level 2: Articulate the problem as clearly as possible, with evidence and precedents

**Summary**

- See the UKGBC and partners' guidelines for further guidance and templates.
- Undertake a challenge identification workshop unless a challenge has been previously identified.
- See the UKGBC’s Sustainable Innovation Manual for further guidance and templates.

**Corporate Guidance**

- The challenge should help improve the environmental and/or social impact of the corporate.
- Perform detailed research into the challenge. Who feels it? How have others tackled it? To do this, skill up internal innovation champions and encourage challenge owners to attend events. Cake and develop a network around the topic (NB. This will take time).
- Establish whether the challenge can be addressed through your organisation’s pre-existing approved suppliers.
- Use UKGBC’s Challenge Definition Template to articulate the challenge in a way others not familiar with it can understand.
- Establish, as an organisation, what level of risk you’re prepared to take on, and pre-qualify any relationships based upon this.
- Consider the TRL model to evaluate risk levels - at what level are you able to engage an innovator? Are you in it for the long game and prepared to help them shape their model to best fit your requirements? (TRL 1-3) or do you require something to be market ready and proven (TRL 9)?
- Ensure that the challenge is big enough to warrant a resolution - calculate the risk associated with not addressing the issue vs the business opportunity associated with its resolution.
- Publicise the challenge (e.g. via website) to engage other actors in the system (“passive scouting”).
- Begin ‘active scouting’ and reaching out to innovators to start to build relationships.
- Work with potential partners to build a common purpose. This comes before establishment of a more formal terms of engagement letter, and serves as an opportunity for individuals involved to get to know each other.
- Establish a level of transparency so that both parties have all their cards on the table as to their intention for the relationship - this builds both trust and reduces the risk of issues down the line.
- To the extent possible, share necessary data and information with innovators.
- Clearly map the scope and timeline of the programme in collaboration with partners.
- Once the partnership is up and running, take care to maintain the relationship.
- Value the outsider’s perspective, and don’t simply view innovators as suppliers. Create the feedback loops that allow them access to the performance data they require to refine and evolve their offering.
- Put in place or leverage processes that enable lessons learned to be rolled out through the organisation to prevent reinventing the wheel for each challenge that face.
- Embark on a media campaign to profile the relationship and its outputs.

**Innovator Guidance**

- Recognise when approaching that a corporate may not even be aware that there is a challenge and may be reticent to admit one. Take them along on the journey to recognise how things could be.
- Your model may seem like the perfect solution based on previous engagement with similar organisations, but bare in mind the variance from business to business that may not make it a strict fit.
- Help the corporate understand their challenge - you have an external view, and previous experience in the area - what works? Why?
- Fully research and understand corporate business model and how you fit in.
- Large corporates are complex systems with detailed and by their nature risk-averse processes. A seeming lack of engagement is likely to be a result of navigating this complexity more than anything else.
- Consider how you can reduce the risk of the corporate taking on an innovator - e.g. offering a share of savings.
- There is unlikely to be any single individual who is able to give a quick go/no-go decision. Build a relationship with the corporate who owns the challenge, and they will feel empowered to find the colleagues best placed to help.
- Bring your experience to the table, but appreciate that your Corporate model may seem like the shared vision you have that will enable you to have a fruitful relationship well into the future?
- Help corporates build the evidence base they need to make the internal business case - this can be using your own experience or competitor research you’ve performed.
- A common purpose is imperative to build trust - what is the shared vision you have that will enable you to have a fruitful relationship well into the future?
- Corporates will be looking for guarantees to mitigate risk - ensure that you are as transparent as possible and can make commitments you are certain you can honour.
- Corporates may be more willing to share this risk than take it all on, so set out scenarios for this.
- Ask for support and build case study of success - corporates will appreciate the positive press.

**References**

- Challenge identification workshop guide
- Challenge definition template
- Technology Readiness Levels (TRL)
- Pre-qualification questionnaires template
- Guy Kawasaki pitch deck
- Systems mapping guidance
- NDAs
- Support tools
- Press releases
- Support tools
- Challenges Definition Workshops
- Hackathons
- Prizes
- Letters of support, Grant partnerships
- Access to facilities, Mentoring
- Trials, Incubation
- NDA's, Investment